

---

---

**CRM Request for Proposal**

---

---

**Rhode Island Economic Development Corporation**

**Request for Proposal for a CRM System**

**July 3, 2013**

## Table of Contents

<b>1</b>	<b>STATEMENT OF WORK.....</b>	<b>3</b>
1.1	PURPOSE.....	3
1.2	COVERAGE & PARTICIPATION .....	3
<b>2</b>	<b>GENERAL INFORMATION .....</b>	<b>3</b>
2.1	ORIGINAL RFP DOCUMENT .....	3
2.2	THE ORGANIZATION.....	3
2.3	EXISTING TECHNOLOGY ENVIRONMENT .....	4
2.4	SCHEDULE OF EVENTS .....	4
<b>3</b>	<b>PROPOSAL PREPARATION INSTRUCTIONS .....</b>	<b>4</b>
3.1	VENDOR’S UNDERSTANDING OF THE RFP .....	4
3.2	GOOD FAITH STATEMENT .....	4
3.3	COMMUNICATION.....	5
3.4	PROPOSAL SUBMISSION .....	5
3.5	METHOD OF AWARD .....	5
3.6	EVALUATION CRITERIA.....	5
3.7	SELECTION AND NOTIFICATION .....	6
<b>4</b>	<b>SCOPE OF WORK, SPECIFICATIONS &amp; REQUIREMENTS.....</b>	<b>6</b>
4.1	ACCOUNT MANAGEMENT FEATURES .....	6
4.2	FIELD MANAGEMENT FEATURES .....	7
4.3	KNOWLEDGE MANAGEMENT FEATURES .....	7
4.4	REPORTING FEATURES .....	7
4.5	TIME MANAGEMENT FEATURES .....	7
4.6	WORKFLOW MANAGEMENT FEATURES .....	8
4.7	TECHNICAL SPECIFICATIONS .....	8
<b>5</b>	<b>VENDOR QUALIFICATIONS AND REFERENCES.....</b>	<b>9</b>
<b>6</b>	<b>BUDGET &amp; ESTIMATED PRICING .....</b>	<b>9</b>
6.1	THREE YEAR TOTAL COST SUMMARY .....	10

## **1 Statement of Work**

### **1.1 Purpose**

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit a proposal to supply a CRM system to the Rhode Island Economic Development Corporation (RIEDC). The RFP provides vendors with the relevant operational, performance, application, and architectural requirements of the system.

### **1.2 Coverage & Participation**

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of all departments at the RIEDC along with any satellite offices. RIEDC reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount.

## **2 General Information**

### **2.1 Original RFP Document**

RIEDC shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

### **2.2 The Organization**

The Rhode Island Economic Development Corporation (RIEDC) is the full service, official economic development organization for the state of Rhode Island. A quasi-public agency, the Corporation serves as a government and community resource to help streamline the business expansion in, and relocation to, Rhode Island. The agency assists companies with commercial real estate, business financing, workforce training, international trade, state and federal procurement, as well as other relevant issues.

The CRM system will be a company-wide tool for use by all departments. The general objectives of a CRM system are to enhance RIEDC's activities related to business retention & expansion, business attraction and relationship management. Specifically we seek to:

- Manage business relationships
- Conduct business retention visits to better understand customer needs
- Evaluate business impacts (value, growth, risk, and satisfaction) to identify problems that could cause employers to leave a community
- Track prospects, firm expansions, and/or startup projects each with project specific teams
- Coordinate service delivery to existing companies
- Deliver value to the customers via internal programs and/or partner programs

- Report findings, status and activity to senior leadership

The number of users is estimated at 40 internal staff members. Additionally, we expect the potential for an additional 40 external users (external partners.)

We have undertaken a fairly comprehensive requirements exercise for our future CRM needs, and are looking for tools that will provide excellent client service functionality and relationship management, as well as tight integration with our back-end financial services portfolio management system.

### **2.3 Existing Technology Environment**

The following is a listing of our current technology environment.

Telephony hardware & software:	<b>Cisco</b>
LAN type:	<b>10/100</b>
Server operating system:	<b>Server 2003 and 2008</b>
Desktop operating system:	<b>XP and 7</b>
Financial Services Software:	<b>Suntell Square 1 Credit Suite</b>

### **2.4 Schedule of Events**

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances.

Issuance of RFP	July 3, 2013
RFP Due Date	July 12, 2013 4:00 EST

## **3 Proposal Preparation Instructions**

### **3.1 Vendor's Understanding of the RFP**

In responding to this RFP, the vendor accepts the responsibility fully to understand the RFP in its entirety, and in detail, including making any inquiries to the RIEDC as necessary to gain such understanding. The RIEDC reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, the RIEDC reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to the RIEDC.

### **3.2 Good Faith Statement**

All information provided by the RIEDC in this RFP is offered in good faith. Individual items are subject to change at any time. The RIEDC makes no certification that any item is without error. The RIEDC is not responsible or liable for any use of the information or for any claims asserted therefrom.

### **3.3 Communication**

Verbal communication shall not be effective unless formally confirmed in writing by specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

Vendors' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Christopher Cannata  
Director of Client Services  
Rhode Island Economic Development Corporation  
315 Iron Horse Way  
Providence, RI 02908

E-mail: ccannata@riedc.com

Applicable terms and conditions herein shall govern communications and inquiries between RIEDC and vendors as they relate to this RFP.

RIEDC will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within 2 business days.

### **3.4 Proposal Submission**

Proposals must be delivered sealed to:

RIEDC  
315 Iron Horse Way  
Suite 101  
Providence, RI 02908

ATTN: CRM System RFP

on or prior to July 12, 2013 4:00 EST. RIEDC shall not accept proposals received by fax.

Vendors are to submit 5 hard copies of the proposal, as well as an electronic version of the proposal on a USB Flash Drive or similar device.

### **3.5 Method of Award**

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization.

### 3.6 Evaluation Criteria:

Criteria	Points
Software provider's experience in economic development at the state and municipal level. Implementation team's knowledge of industry-wide economic development best practices. Company's reputation/history of providing services to similar agencies.	25
Capability of product to meet the needs of the RIEDC as described herein.	25
Business retention and expansion analysis tools – product provides tools for conducting comprehensive portfolio assessments to measure the quality and strength of the business base.	25
Three year cost.	25

**Total Score**

**100**

### 3.7 Selection and Notification

The vendor determined by RIEDC to possess the highest score will be selected to move into the negotiation phase of this process. Written notification will be sent via email. Those vendors not selected for the negotiation phase will not be notified.

## 4 Scope of Work, Specifications & Requirements

### 4.1 Account Management Features

#### 1. Contact Management

The management of all the tasks and information related to developing and maintaining relationships with the companies with whom we do business.

#### 2. Customizable Fields

User-defined fields can be added anywhere where data can be entered.

#### 3. Contact History

A log of all transactions, activities, and communications (including notes, emails and phone calls) is available for each contact.

#### 4. Account Information

This includes, but is not limited to, contact name, decision maker name, phone, address, email, fax, web address, important dates, hobbies, activities, communication preferences, etc.

## **5. Activity Management**

The management of all activities performed per representative per contact every day.

### **4.2 Field Management Features**

#### **1. Mobile Synchronization**

Provides the ability to access the system via a mobile device, such as a smartphone and/or tablet.

#### **2. E-mail Synchronization**

The ability of the CRM system to synchronize with an e-mail system, such as MS Exchange.

### **4.3 Knowledge Management Features**

#### **a. Information Feeds**

Integrates with third party information systems or allows for importing/exporting of third party data.

#### **b. Information Attachment**

Allows outside files (such as doc, pdf, rtf, etc.) to be linked to data within the CRM system.

#### **c. Integration with MS Office Tools**

Allows users to create files within the MS Office suite of products and import/export them to the system, or integrates seamlessly with the products themselves.

### **4.4 Reporting Features**

#### **1. Pre-defined Reports**

A set number of pre-packaged reports are available to the user from the CRM system.

#### **2. User-defined Reports**

The user can create their own reports based on their defined set of criteria from within the CRM system.

#### **3. Ad-hoc Query Generator**

The user can easily create their own queries based on their own defined set of criteria.

### **4.5 Time Management Features**

#### **1. Calendar**

The system uses a native (or integrated with an existing calendaring system, i.e. Outlook) calendar. The calendar allows for the entry of appointments, scheduling tasks, inputting special dates and appointments, etc. Ideally the calendar should synch with existing calendaring/e-mail in use (i.e. Outlook).

#### **2. Task Lists**

The system uses a native (or integrated) task list, usually part of an e-mail or calendar system.

**3. E-mail**

The system uses a native (or integrated with existing e-mail system, i.e. Outlook, Lotus Notes) e-mail system. The e-mail system allows for correspondence and sending of information to clients and partners. Ideally the e-mail should synch with existing e-mail in use.

**4. Notes**

The system allows unlimited notes to be added to each contact.

**5. Transaction/Audit Log**

The system logs all activities for each contact and user and allows for the easy retrieval of this information.

**4.6 Workflow Management Features**

**1. Process Configurability**

Processes within the system can be configured by the users to meet their workflow needs.

**2. Task Reassignment**

Tasks can be reassigned from one user to another easily.

**3. Create Triggers for Follow-up**

Tasks can be assigned to others and alerts or alarms can be set to remind them to initiate follow-up.

**4.7 Technical Specifications**

**1. Client Operating Systems Supported**

What client operating systems are supported by the CRM system?

**2. Server Operating Systems Supported**

What server operating systems are supported by the CRM system?

**3. Scalability**

How many concurrent users can be supported on this system? Can the system be scaled across servers?

**4. Minimum Hardware Requirements**

Describe the minimum and recommended hardware requirements for both client and server.

**5. Database Servers Supported**

What database servers are natively supported and/or used by this product?

**6. Hosted or Client-Server Based**



Identify if this is a Hosted-CRM solution or a traditional desktop or client-server application.

## **5 Vendor Qualifications and References**

All vendors must provide the following information in order for their proposal to be considered:

1. A brief outline of the vendor company and services offered, including:
  - Full legal name of the company
  - Year business was established
  - Number of people currently employed
2. An outline of the product line-up they currently support.
3. Information on current software clients, including:
  - Total number of current clients
  - A list of clients in the Economic Development Sector with similar needs using the same software
4. References: Contact information for 5 references (if possible) from projects similar in size, application, and scope and a brief description of their implementation.

## **6 Estimated Pricing**

All vendors must fill out the following cost breakdown for the implementation of their CRM system for the RIEDC's project as described in this RFP. Costs should be identified as either capital or non-capital in nature. The vendor must agree to keep these prices valid for 45 days as of July 12, 2013.

## 6.1 Three Year Total Cost Summary

Three Year Total Cost Summary				
Costs	Total	Year 1	Year 2	Year 3
Hardware				
Software Licensing				
Third Party Software				
Application Software				
Documentation & Training				
Maintenance				
Installation				
Integration				
Legacy Data Loading				
Project Management				
Misc.				
Other (specify)				
<b>Total:</b>				

### Descriptions:

**Hardware:** List, describe, and record the cost of each piece of hardware that is required to optimally run the software.

**Software Licensing:** List, describe, and record the licensing, implementation, maintenance, support, and training fees associated with your proposed software.

**Third-Party Software (Middleware):** List, describe, and record the cost of each piece of software (including operating systems) that is required to optimally run the software.

**Installation:** Describe any labor, equipment, supplies, or other costs associated with installing your proposed software.

**Integration:** Describe any labor, equipment, supplies, or other costs associated with integrating your software into our current architecture and back-end systems.

**Legacy Data Loading:** Describe any labor, equipment, or other costs associated with importing legacy data from current systems into your CRM software.

**Maintenance:** Describe and cost out any other ongoing costs associated with the operation and maintenance of your proposed software.

**Documentation & Training:** If there are fees associated with your user or technical documentation, list them here.

**Project Management:** If there are project management fees associated with your proposed software, list and describe them here.

**Miscellaneous:** List and describe any other costs associated with your proposed software solution.